

**EXHIBIT IX.1 – PRELIMINARY REVIEW SHEET**

Firm's Name _____

The response package includes the following:

Received (24) copies of Volumes I and III	Yes <input type="checkbox"/> No <input type="checkbox"/>
Received (4) copies of Volume II	Yes <input type="checkbox"/> No <input type="checkbox"/>
Received (7) copies of Volume IV	Yes <input type="checkbox"/> No <input type="checkbox"/>
Received (2) CD-ROM versions of Volumes I and IV	Yes <input type="checkbox"/> No <input type="checkbox"/>
Received (3) copies of financial data requested in Proposal Item 9 in separate, sealed envelope	Yes <input type="checkbox"/> No <input type="checkbox"/>
Received by time and date specified in RFP.	Yes <input type="checkbox"/> No <input type="checkbox"/>
One loose-leaf, three-ringed binder containing original signatures marked "Master Copy" .	Yes <input type="checkbox"/> No <input type="checkbox"/>
One loose-leaf, three-ringed binder marked "Copy for Reproduction" and formatted as follows: a. Text printed on one side only (i.e., no back-to-back pages); b. Pages with proprietary information removed; and, c. A cover sheet listing the firm's name, the total number of pages, and identification of which page(s) has (have) been removed due to proprietary information.	Yes <input type="checkbox"/> No <input type="checkbox"/>
VOLUME I – RESPONSE TO REQUIREMENTS	
Section 1: Cover letter (Section V.B.1) Proposal Item 1	Yes <input type="checkbox"/> No <input type="checkbox"/>
a. A statement to the effect that the proposal is a firm and irrevocable offer good for 180 calendar days.	Yes <input type="checkbox"/> No <input type="checkbox"/>
b. A statement expressing the QBP's willingness to perform the services as described in this RFP.	Yes <input type="checkbox"/> No <input type="checkbox"/>
c. A statement expressing the QBP's availability of staff and other required resources for performing all services and providing all deliverables as described in this RFP.	Yes <input type="checkbox"/> No <input type="checkbox"/>
d. A statement expressing that all personnel assigned to the PSR Project, including those working off-site or off-shore, will submit a signed Confidentiality Statement.	Yes <input type="checkbox"/> No <input type="checkbox"/>



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VOLUME I – RESPONSE TO REQUIREMENTS (CONTINUED)		
Section 2: Executive Summary		Yes <input type="checkbox"/> No <input type="checkbox"/>
a. Company background and qualifications (include all subcontractors);		Yes <input type="checkbox"/> No <input type="checkbox"/>
b. A discussion that demonstrates that the QBP understands the nature and purpose of this RFP; CalPERS objectives, environment, and business needs;		Yes <input type="checkbox"/> No <input type="checkbox"/>
c. A summary discussion and diagram(s), if appropriate, of the proposed solution, documentation of QBP's assumptions, and a description showing that the solution meets all aspects of the requirements;		Yes <input type="checkbox"/> No <input type="checkbox"/>
d. An overview of the proposed system architecture, operating system, and application software and a detailed description of the benefits that can be expected by implementing the proposed solution and how those benefits can be quantified; and,		Yes <input type="checkbox"/> No <input type="checkbox"/>
e. The QBP's description of CalPERS precise role and responsibilities in the proposed project.		Yes <input type="checkbox"/> No <input type="checkbox"/>
Section 3: Response to the Administrative and Technical Requirements (Section V)		Yes <input type="checkbox"/> No <input type="checkbox"/>
Attachment V.1, Administrative Requirements Matrix		Yes <input type="checkbox"/> No <input type="checkbox"/>
a. Administrative – Business Qualifications (Section V.B)		
Proposal Item 2 (Attachment V.2, Proposal/Proposer Certification Sheet)		Yes <input type="checkbox"/> No <input type="checkbox"/>
Proposal Item 3 (Attachment V.3, California Taxpayer and Shareholder Protection Act Declaration)		Yes <input type="checkbox"/> No <input type="checkbox"/>
Proposal Item 4 (Attachment V.4, DVBE Participation)		Yes <input type="checkbox"/> No <input type="checkbox"/>



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VOLUME I – RESPONSE TO REQUIREMENTS (CONTINUED)		
Proposal Item 5		Yes <input type="checkbox"/> No <input type="checkbox"/>
Small Business Preference Claimed?	Yes • No •	
TACPA Preference Claimed?	Yes • No •	
EZA Preference Claimed?	Yes • No •	
LAMBRA Preference Claimed?	Yes • No •	
Proposal Items 6 - 13		Yes <input type="checkbox"/> No <input type="checkbox"/>
b. Project Activities and Plans (Section V.C)		
Response to Proposal Items 14 - 34		Yes <input type="checkbox"/> No <input type="checkbox"/>
c. Project Staffing and Organization (Section V.E)		
Response to Proposal Items 35- 41		Yes <input type="checkbox"/> No <input type="checkbox"/>
d. Project Work Standards (Section V.F)		
Response to Proposal Item 42		Yes <input type="checkbox"/> No <input type="checkbox"/>
e. Technical Requirements (Section V.G and V.H)		
Response to Technical Requirements 1 - 141		Yes <input type="checkbox"/> No <input type="checkbox"/>
Response to Technical Proposal Items 43 - 112		Yes <input type="checkbox"/> No <input type="checkbox"/>
Section 4: Response to the Business Requirements		Yes <input type="checkbox"/> No <input type="checkbox"/>
Response to Business Requirements 1 through 315		Yes <input type="checkbox"/> No <input type="checkbox"/>
VOLUME II – LITERATURE		
This volume will contain all technical and other reference literature necessary to support the responses to the requirements of this RFP (i.e., product “glossy” brochures, equipment technical specification brochures, technical or user manuals that may be advertised in response to the requirements, and other advertising materials). Literature must be tabbed, page numbered, indexed, and properly annotated so CalPERS can readily verify compliance with the stated requirements. <u>Any references to cost figures in the literature must be replaced with “XXXX”.</u>		Yes <input type="checkbox"/> No <input type="checkbox"/>



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VOLUME III – COST PROPOSAL	
Cost Proposal is submitted in a separate, sealed envelope.	Yes <input type="checkbox"/> No <input type="checkbox"/>
VOLUME IV – COMPLETED CONTRACT	
This volume must contain a completed contract with all blanks filled in, except for cost. Submission of a contract with CalPERS unapproved modifications may cause the Final Proposal to be deemed non-responsive.	Yes <input type="checkbox"/> No <input type="checkbox"/>
VERIFICATIONS PERFORMED	
Has Contractor been decertified by the Department of Fair Employment and Housing? (Check the California Regulatory Notice Register at http://www.oal.ca.gov/notice.htm)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Does Contractor have a Negative Evaluation on file with DGS Legal?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is the Corporation registered and in good standing to do business in California? (Check the Secretary of State website at http://kepler.ss.ca.gov/list.html to verify status)	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>

COMMENTS: _____
